Job Aid:

How to Set Up a Master Blanket for ordering using a Migrated Comm-PASS Contract

This Job Aid shows a Basic Purchasing user how to:

- Search for migrated Department contracts
- Review and Download Attachments
- Clone migrated (vCurrent) Blanket
- Update a Master Blanket Purchase Order
- Submit PO for Approval and/or Send PO to Vendor

Of Special Note:

Comm-PASS documents (solicitations, contracts) were brought over into COMMBUYS; however these documents require updating and review. **You must be a Basic Purchasing user with appropriate privileges for the organization that owns the migrated document to perform most of the steps outlined below**. Departments use three types of Vendor (Seller) Contracts, and this Job Aid will focus on two.

1. Master Blankets with one vendor (awarded contractor) and a catalog of line items specific to that vendor. These blankets, often referred to as "**single vendor based**," are ideal for contracts where pricing is fixed and does not require a quote however these Blankets can be "Solicitation Enabled" in order to support issuing Bids to get price quotes when desired. This setup requires you to create a separate Master Blanket for each awarded contractor.)

2. Master Blankets with multiple vendors listed as distributors who fall under one placeholder vendor. (These blankets, often referred to as "**multi-vendor based**," can be "Solicitation Enabled" in order to support issuing Bids to get price quotes from the contractors, and then placing orders with the quote winner(s). This setup requires you to create one Master Blanket that would contain all the awarded contractors.

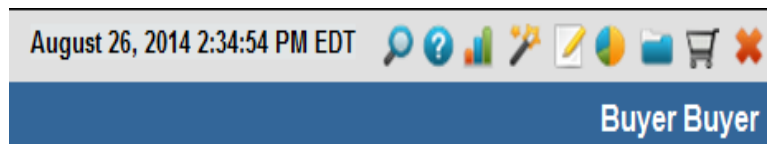| Screenshot	Directions
	1. Launch the COMMBUYS URL. Type https://www.commbuys.com/bso/ in the Browser. Enter your Login ID and password and click the **Login** button on the COMMBUYS landing page.

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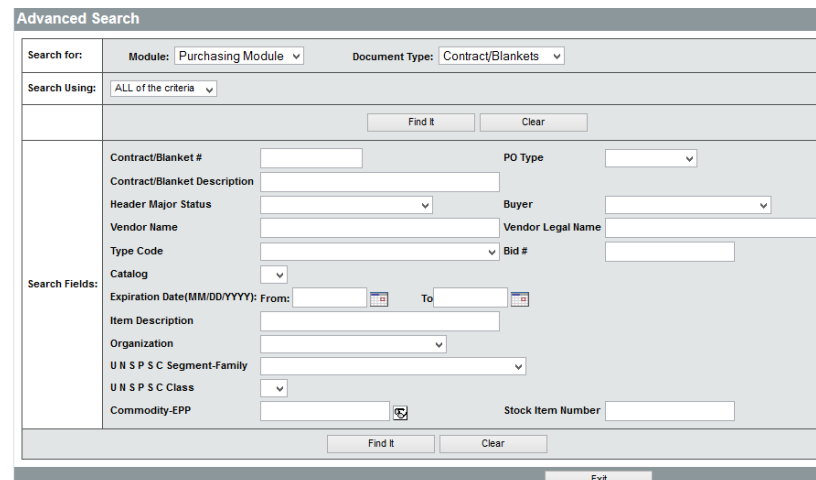| Screenshot	Directions
	2. To Search for migrated Blankets, click on the magnifying glass on the Header Bar to display the Advanced Search window
	3. Select the radio button for **Contracts / Blankets.**
	4. Use any of the search criteria fields to search for the contract you are looking for. • The **Contract/Blanket #** is the COMMBUYS Blanket numbering scheme – not the Comm-PASS contract number. • **Contract/Blanket Description –** to search for the Comm-PASS contract number enter it into the field • **Vendor Name** can be used to find documents with all or part of the entered data in their name • If you are seeing too many results, including those with "v#" in the file name where "#" is a number, filter your results by selecting **Header Major Status** and choosing, "**Sent**" for a contract that was previously awarded in Comm-PASS or "**In-Progress**" if it was a draft at the time of migration. Click **Find It** after entering information

Screenshot	Directions

Screenshot:

Advanced Search ▫

Results

Contract/Blanket #	Description	Vendor Name	Organization	Status	Begin Date	End Date
C101576-VW0000	05-8043-LABELS		Department of Correction	3PCO - Closed		
C101576-VW0001	05-8043-LABELS		Department of Correction	3PCO - Closed		
C101576-VW0002	05-8043-LABELS		Department of Correction	3PCO - Closed		
C101576-VW0003	05-8043-LABELS		Department of Correction	3PCO - Closed		
C101576-VW0004	05-8043-LABELS		Department of Correction	3PCO - Closed		
C101576-VW0005	05-8043-LABELS		Department of Correction	3PCO - Closed		
C101576-VW0006	05-8043-LABELS		Department of Correction	3PCO - Closed		
C101576-vCurrent	05-8043-LABELS		Department of Correction	3PS - Sent		

Exit

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Directions:

5. From the displayed results, select the desired **Statewide Contract/Blanket #**.

If you need to refine your search results after searching, press the "**+**" icon next to **Advanced Search** to display and edit your search criteria.

Select the "vCurrent" **Contract/Blanket #** link

Result Columns:
- **Contract/Blanket #** – ######-vCurrent is the converted contract record from Comm-PASS
- **Description** – Department Contract number/name from Comm-PASS
- **Vendor Name** – Conversion Vendor (all vCurrent Blankets will have the main Vendor name as Conversion Vendor)
- **Organization** – Name of the organization who owns the MBPO
- **Status** – 3PS Sent (Active MBPO)
- **Begin Date** – Start date of contract
- **End Date** – End date of contract

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Screenshot	Directions

	6. The Master Blanket Purchase Order # (MBPO) vCurrent Information displays
	
	This page is broken into headings:
	• **Header Information**: general contract information
	 ○ **Organization**
	 ○ **Department**
	 ○ **Location**
	 ○ **Contact Instructions**
	 ○ **Attachments**
	 ○ **Status**
	 ○ **Type Code**
	   ▪ Statewide
	   ▪ Non-Statewide
	 ○ **Solicitation Enabled** – checkbox that determines whether this is a catalog vs. a blanket used for future Bids for pricing not specified in a catalog.
	• **Attachments**: all attached files and templates for the MBPO
	• **Primary vendor information:** Conversion Vendor holds the place as a primary Vendor for the departmental contract
	• **Master Blanket Vendor distributor list**: the vendors are not listed active for this COMMBUYS MBPO
	• **Master Blanket controls**: beginning and end date for the contract, as well as who can use the contract
	• **Item information**: converted information was placed in the line item description and will need to be corrected by the department
	• **Approval Paths**: displays the approvers who were on the approval path for the creation of the MBPO

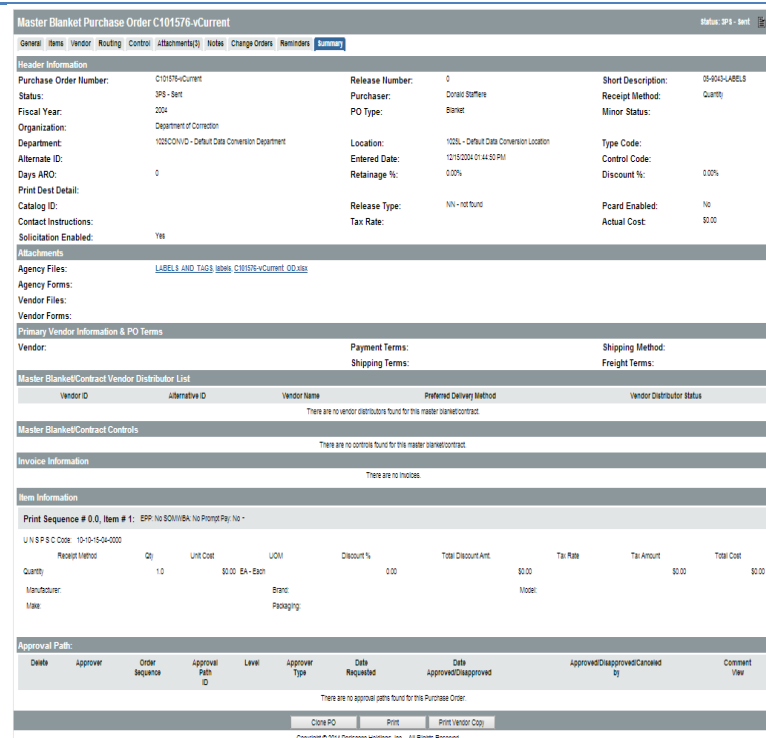| Screenshot	Directions
Master Blanket Purchase Order C101576-vCurrent — Status: 3PS - Sent — Attachments tab showing Files: LABELS AND TAGS (Request for Response), labels (Contract Details), C101576-vCurrent_OD.xlsx (C101576vCurrent Data from Comm-PASS)	7. The **Attachments** tab is where you will find all key contract information. In this example, we see the RFR and contract amendments. All attachments will need to be uploaded to the new Purchase Order(PO) The orphan data file is the only attachment that will clone over into the new MBPO. • The attachment C101576-vCurrent_OD.xlsx, is the Orphan Data attachment. Every converted document from Comm-PASS will have an attachment for any Comm-PASS data that did not match in COMMBUYS. It will always be the last attachment listed; it contains information from Comm-PASS that is not displayed in COMMBUYS. To open and download a file, click the blue hyperlinked name.
Attachment File Detail: LABELS_AND_TAGS panel	8. This panel displays when you click the file name. To open the document, click the hard drive icon. Only the orphan data file attachment will copy over into the new MBPO. Download and save to the desktop all other files. After any updates or edits are completed, upload any relevant attachments to the new MBPO.
Master Blanket Purchase Order C101576-vCurrent — Summary tab	9. Return to the **Summary** tab and scroll down to the bottom of the page. Clone the purchase order *once for each* Vendor in a Line Item catalog. Clone the PO only *once for all* vendors in a Distributor catalog.

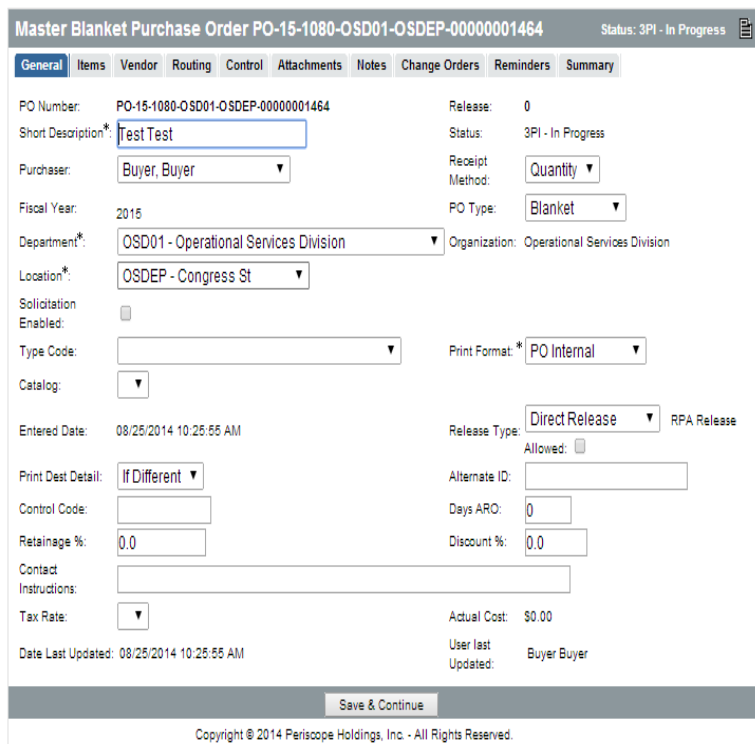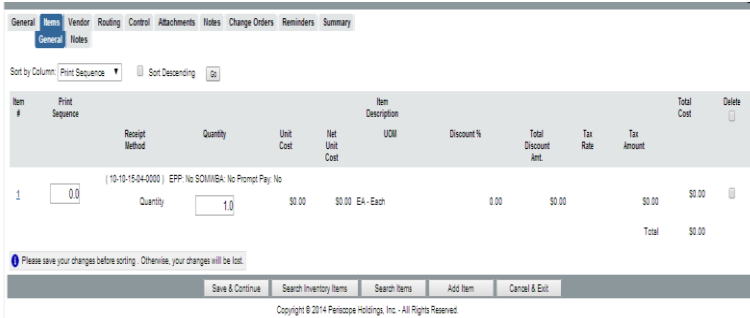| Screenshot	Directions
	10. The **General** tab displays the cloning result. Notice a NEW Master Blanket Purchase Order Number is generated You are able to edit any information fields on this panel. The **General** tab contains all the high level, header information for the MBPO. **Short Description:** use this space to enter your agency's contract numbering information, as well as a few key words for easy searching **Release Type**: • **Direct Release**: a single vendor blanket with specific pricing; select if you would like the order (PO) to be ready to send to the vendor once the requisition is approved • **Standard Release**: used for any blanket with or without pricing, select if you would like the order (PO) to require an second approval for the PO and or to request quotes from the vendor(s) on the MBPO If the blanket will serve as a multi-vendor contract used for conducting Bids to get pricing for specific orders, be sure to select **Solicitation-Enabled** and instruct users to create **Solicitation Enabled release requisitions** when ordering from this contract. • Multi-Vendor based blankets require "Standard Release" • In some cases, departments may choose not to check off "Solicitation Enabled" on a distributor blanket. One example of such a contract is a true distributor situation, where all the vendors are selling the same products at the same pricing. **Type Code**: select from the drop down • NC - Non-Statewide Contract • SW - Statewide Contract: only for authorized and OSD-issued contracts. Refer to policy considerations outlined in the OSD COMMBUYS Policy document with any further questions. **Contact Instructions**: enter contract contact information in the open field Click **Save & Continue**

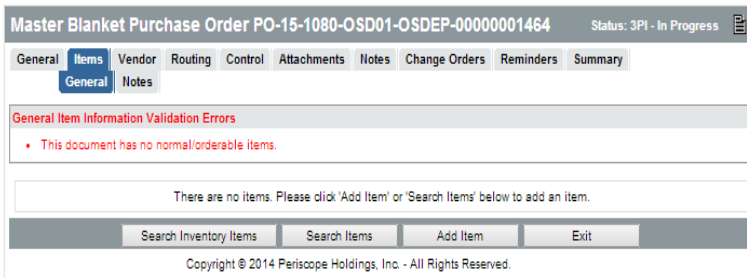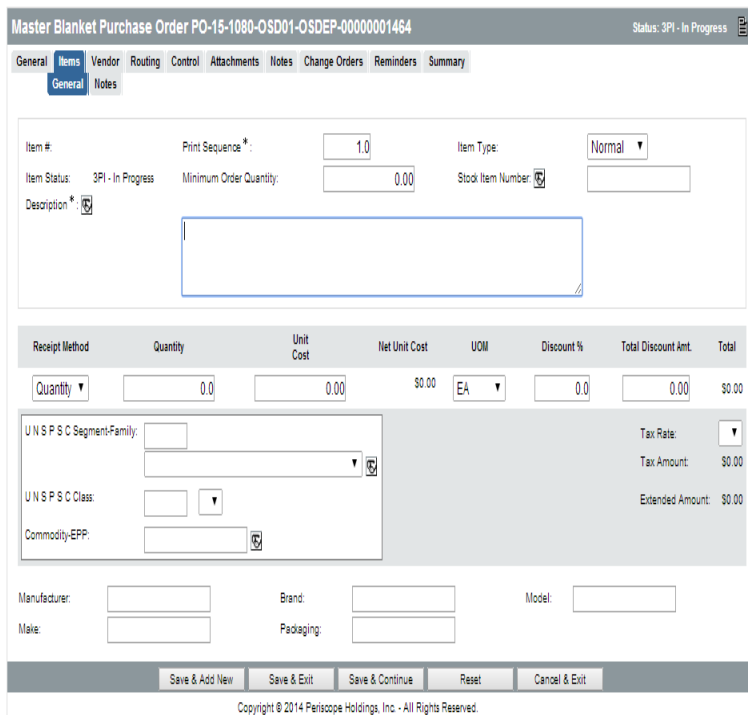| Screenshot	Directions
	11. Click on the **Items** tab Delete the existing item and / or add additional items. Click **Save & Continue**
	12. Click **Add Item** Ignore the red validation error, as the next few steps are demonstrating how to add an orderable item

Screenshot	Directions
	13. The **Add Item** button opens a new screen to enter "item" detail Enter/Select the following: • **Description:** good/service description; up to 400 characters • **Receipt method:** quantity or dollars; choose based on receiving needs for the blanket • **Quantity:** (at least 1) make sure it is relevant to the receipt method • **Unit cost:** cost associated with the item/service per unit (can leave 0 to allow buyer to enter information) • **UOM** (Unit of Measure): choose from drop down If this is a multi-vendor blanket, the description should be specific enough to determine what the purchaser is asking the vendors to provide quote information for. • It is recommended you indicate that users should create a Solicitation Enabled requisition when ordering this item. In a single vendor PO, use the item section to define specific products or services, the related UNSPSC codes and pricing information. • If pricing varies based on an item attribute, create separate items with distinct pricing. If you need users to be able to enter quoted prices, leave price blank and instruct them to enter pricing and edit or add to the description on their release requisitions so that the vendor knows what buyers are ordering. Click the eyeglass icon to search and select the UNSPSC code

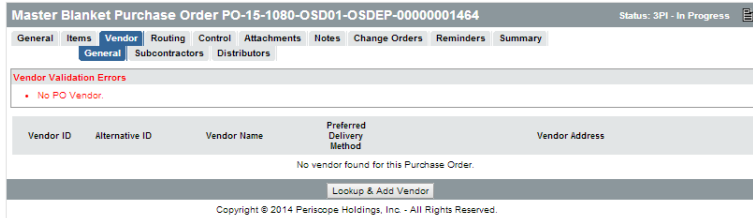| Screenshot	Directions
Commodity-EPP and Service Codes **Search** U N S P S C Segment-Family U N S P S C Class U N S P S C Keyword: plumbing Search using: ALL of the criteria Search **U N S P S C Code Browse** Show Categories Code / Description 30-18-00 Plumbing fixtures 30-18-15 Sanitary ware 30-18-16 Non sanitary residential fixtures 30-18-17 Faucets or taps 30-18-18 Faucet and shower heads, jets and parts and accessories 72-10-23 Plumbing and heating and air conditioning 72-15-11 Plumbing construction services Save & Exit Cancel & Exit Copyright © 2014 Periscope Holdings, Inc. - All Rights Reserved.	14. Use the pop-up window to search for UNSPSC • Enter keyword or select family segment • Select radio button for best code Click **Save & Exit**
Master Blanket Purchase Order PO-15-1080-OSD01-OSDEP-00000001464 Status: 3PI - In Progress General **Items** Vendor Routing Control Attachments Notes Change Orders Reminders Summary **General** Notes Item #: Print Sequence *: 1.0 Item Type: Normal Item Status: 3PI - In Progress Minimum Order Quantity: 0.00 Stock Item Number: Description *: Test for goods and services Receipt Method / Quantity / Unit Cost / Net Unit Cost / UOM / Discount % / Total Discount Amt. / Total Quantity 1.0 0.00 $0.00 EA 0.0 0.00 $0.00 U N S P S C Segment-Family: 72-15 72-15 - Specialized trade construction... Tax Rate: U N S P S C Class: 11 11 - Plumbing construction services Tax Amount: $0.00 Commodity-EPP: Extended Amount: $0.00 Manufacturer: Brand: Model: Make: Packaging: Save & Add New Save & Exit Save & Continue Reset Cancel & Exit Copyright © 2014 Periscope Holdings, Inc. - All Rights Reserved.	15. Once you done entering information for the item/service click either **Save & Exit** or **Save & Add More** to enter more line items for the contract.
Master Blanket Purchase Order PO-15-1080-OSD01-OSDEP-00000001464 Status: 3PI - In Progress General **Items** Vendor Routing Control Attachments Notes Change Orders Reminders Summary **General** Notes Sort by Column: Print Sequence Sort Descending Go Item # / Print Sequence / / Item Description / / / / Total Cost / Delete / / Receipt Method / Quantity / Unit Cost / Net Unit Cost / UOM / Discount % / Total Discount Amt. / Tax Rate / Tax Amount (72-15 - 11) Test for goods and services 1 1.0 Quantity 1.0 $0.00 $0.00 EA - Each 0.00 $0.00 $0.00 $0.00 Total $0.00 ⓘ Please save your changes before sorting . Otherwise, your changes will be lost. Save & Continue Search Inventory Items Search Items Add Item Cancel & Exit Copyright © 2014 Periscope Holdings, Inc. - All Rights Reserved.	16. The layout shown here is how COMMBUYS displays items and services (including those who have not logged in). To edit an item you have already entered, click the item number link.
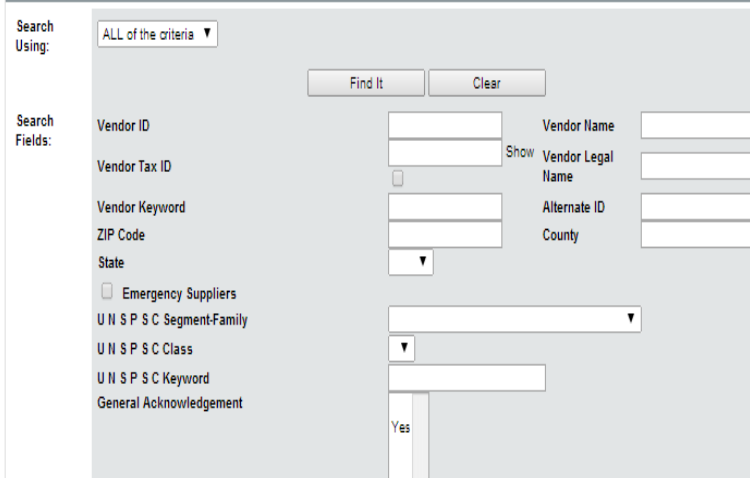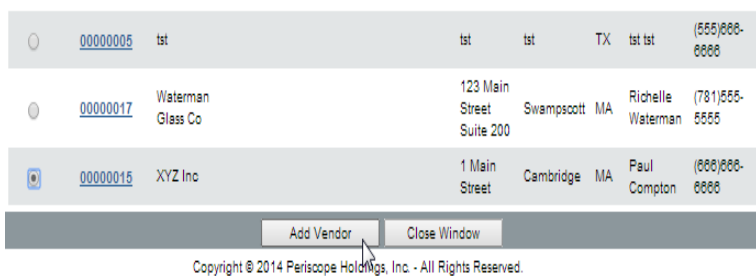
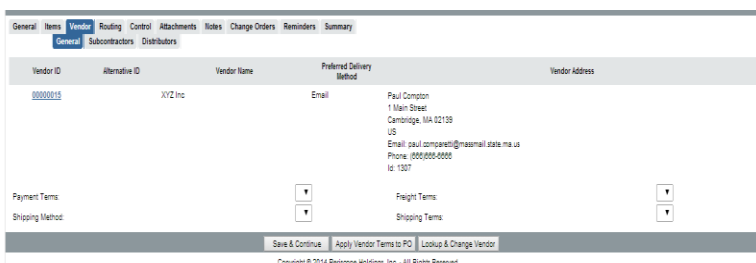| Screenshot	Directions
	17. Click to the **Vendor** Tab Click the **Look Up & Add Vendor** button
	18. Enter your Search criteria and click **Find It**
	19. Click the radio button for the desired Vendor. If you do not see the vendor you are looking for, try searching again or contact the vendor to see if they are registered. You cannot add unregistered vendors to a purchase order in COMMBUYS. Then click the Add Vendor button
	20. If distributor catalog, select the Conversion Vendor as your general Vendor, in the step above Click on the Distributors tab to add vendors on the contract NOTE: The Conversion Vendor acts as an overall placeholder for the contract and allows you to enter all departmental contract vendors on the MBPO without showing favoritism.
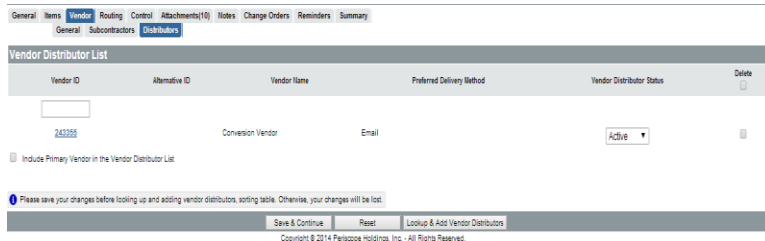
Screenshot	Directions
	21. Click the **Lookup & Add Vendor Distributors** button.
	22. A Vendor Search pop up window displays. Search for the Vendors on the contract, the search will only return registered COMMBUYS vendors. You will need to search for the vendors one by one using their name. Click **Save & Exit** once complete
	23. On the Control tab enter the Master Blanket Contract Begin and End Date Click **Save & Continue**
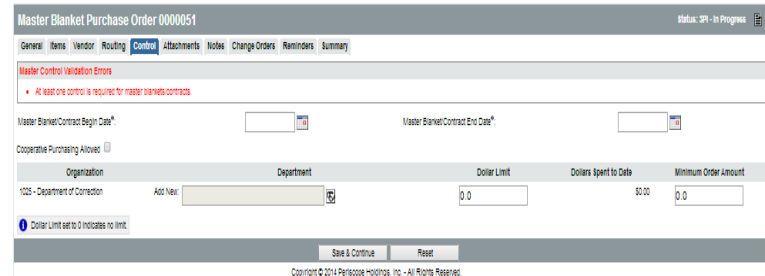
Screenshot	Directions
	24. Next add the organization(s) that can use the MBPO in accordance with the negotiated contract. Select the Department(s) from your organization who will need use this contract, or select **Agency Umbrella Master Control** to select all departments in your organization. If you are contractually allowed to add another organization: select the organization by clicking on the eyeglasses to search for the organization and department. You can also set a dollar limit or minimum order amount if the contract has dollar stipulations. If all organization in COMMBUYS can purchase from the MBPO, check the **Cooperative Purchasing** box and in the organization search for / select ALL ORGs – only with OSD's authorization. Click **Save & Continue**
	25. Click to the **Attachments** tab Here you will need to upload all attachments relevant this the MBPO Click **Add File**
	26. Click Choose File The **Name*** will auto populate from the name of the file, but you can use the description to enter more detail. The system does not require a specific file name. Click **Save & Exit** Note: Each attachment will need to be added separately.
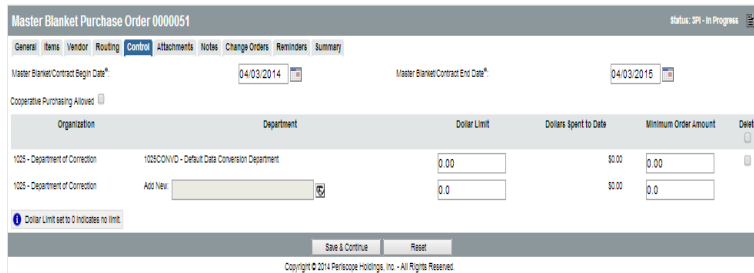
Screenshot	Directions
	27. Click on the **Summary** tab Review the purchase order content. Click **Submit for Approval**. The Blanket PO will be routed through any approvals required and may be returned to you to re-open, edit and resubmit if approvers have disapproved with comments about changes needed.
	28. Once approvals have been granted, open the MBPO One way to find the document is using your control center • **PO > Ready to Send** Click the **Purchase Order #** to open the MBPO

	29. At the bottom of the **Summary** page, select one of the following options:
	    • **Send Email and Notify Vendor**
	    • **Set to Printed Status**.
	
	Set to Printed Status does not notify the Vendor. For a contract already sent in Comm-PASS, you might want to use this option. Use Send Email and Notify vendor if this is a new contract and the vendor requires notification.
	
	Click **Save & Continue** to put the Blanket PO into Sent status.

Screenshot	Directions
Vendor Notification Result Subject: Purchase Order Notification - office supplies **Email Recipients** Delivery Date: 01/29/2014 02:20:15 PM <table><tr><th>Vendor ID</th><th>Vendor Name</th><th></th></tr><tr><td>00000006</td><td>Wiki's Widgets</td><td>Alyssa Arnold (linda.banks-grant@accenture.com)</td></tr></table> OK	30. Confirm the email recipients and click the **OK** button. From this point onward, changes will require a Change Order to be created, submitted, approved and applied to the PO.